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ABSTRACT

Described is a collaborative linkage and support system for delivery of training programs in special education aimed primarily at increasing capabilities of regular classroom teachers and public school administrators providing instructional alternatives for children with special needs. The program's four major objectives are outlined as identification of training needs of local schools through an assessment process; making an inventory of successful training practices in special needs for application to inservice education; development of gaming and simulation training materials in selected high need areas where programs are nonexistent; and implementation of training sessions through a college-community collaborative model. The bulk of the document is a program narrative which covers the topics of problem description, results and benefits of the proposal, approach of the study, geographic location of the collaborative project, and backgrounds of project personnel. The benefits of the proposed activities are noted as high impact on target population, the development of improved inservice dissemination models, commitment for continued support from local school systems, specific product outcomes, and cost-effectiveness. Appended are a letter of support, and overview of the principal's training program, and an outline of a school planning game. (Author/SB)

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ESTABLISHING EFFECTIVE TRAINING LINKAGES IN SPECIAL EDUCATION AT THE LOCAL AGENCY LEVEL

A COLLABORATIVE PROJECT

Submitted by:

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ESTABLISHING EFFECTIVE TRAINING LINKAGES IN SPECIAL EDUCATION AT THE LOCAL EDUCATIONAL AGENCY LEVEL

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EC 081 110

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ABSTRACT

This proposal describes a collaborative linkage and support system for delivery of training programs in special education. These training programs are primarily aimed at increasing capabilities of regular classroom teachers and public school administrators. The proposal designs a deliberate system for training activities that will offer change support and product support as new legislation is implemented in Massachusetts.

As a major goal, these linkage and support mechanisms link organizationally with school systems to initiate substantial, systematic changes. Key leadership person, unit leaders, principals, and central office administrators are trained in a leadership institute to provide "trainers" of teachers. The collaborative of school systems links with the leading State College in special education and, working cooperatively, these organizations pursue the explicit goals and objectives around which local school systems provide training programs.

The project staff will carry out the goals through four major objectives: (a) to identify training needs of local schools through an assessment process; (b) to inventory successful training practices in special needs for application to inservice education; (c) to develop gaming and simulation training materials in selected high need areas where programs are non-existent; and, (d)to implement training sessions through a college-community collaborative model.

Training efforts utilize materials developed and tested and proven effective in national R&D efforts. Additionally, the development of twelve games for simulation experiences will enhance the training programs. New items to be designed will also include trainers' manuals and resource guides for the inventory of successful training practices.

The benefits of the proposed activities take the forms of high impact on target population, the development of improved inservice dissemination models, commitment for continued support from local school systems, specific product outcomes and cost-effectiveness.

OMB NO. 80-R0186

APPLICATION FOR FEDERAL ASSISTANCE
(NONCONSTRUCTION PROGRAMS)
PART I

1. STATE CLEARINGHOUSE IDENTIFIER: NA

2. APPLICANT'S APPLICATION NUMBER: NA

3. FEDERAL GRANTOR AGENCY: U. S. Office of Education
ORGANIZATIONAL UNIT: Educatic Systems Development
ADMINISTRATIVE OFFICE: Application Control Center
STREET ADDRESS - P.O. BOX: Washington, D.C. 20202
CITY / STATE / ZIP CODE

4. APPLICANT NAME: Richard J. Lavin, Ed. D.
DEPARTMENT DIVISION: Merrimack Education Center
STREET ADDRESS - P.O. BOX: 101 Mill Road
CITY / COUNTY: Chelmsford, Mass. 01824
STATE / ZIP CODE

5. DESCRIPTIVE NAME OF THE PROJECT
Establish Effective Training Linkages in Special Education at the Local ~~System Level~~

6. FEDERAL CATALOG NUMBER: 13.417

7. FEDERAL FUNDING REQUESTED: $ 89,150.00

8. GRANTEE TYPE: Local Education Agency, Chelmsford, Mass.
___ STATE, ___ COUNTY, X CITY, ___ OTHER (Specify)

9. TYPE OF APPLICATION OR REQUEST
X NEW GRANT, ___ CONTINUATION, ___ SUPPLEMENT, ___ OTHER CHANGES (Specify)

10. TYPE OF ASSISTANCE
X GRANT, ___ LOAN, ___ OTHER (Specify)

11. POPULATION DIRECTLY BENEFITING FROM THE PROJECT: 1200-1500

12. CONGRESSIONAL DISTRICT
a. Chelmsford - Fifth
b. Regional Collaborative of 20 Communities

13. LENGTH OF PROJECT: One year

14. BEGINNING DATE: July, 1974

15. DATE OF APPLICATION: May 3, 1974

16. THE APPLICANT CERTIFIES THAT TO THE BEST OF HIS KNOWLEDGE AND BELIEF THE DATA IN THIS APPLICATION ARE TRUE AND CORRECT, AND THAT HE WILL COMPLY WITH THE ATTACHED ASSURANCES IF HE RECEIVES THE GRANT.

TYPED NAME	TITLE	TELEPHONE NUMBER		
		AREA CODE	NUMBER	EXTENSION
Richard J. Lavin, Ed. D.	Executive Director	617	256-3985	

SIGNATURE OF AUTHORIZED REPRESENTATIVE
Richard J. Lavin

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HEW-600T

PART II
PROJECT APPROVAL INFORMATION

ITEM 1.
Does this assistance request require State, local, regional, or other priority rating?

☐ Yes ☒ No

Name of Governing Body _____
Priority Rating _____

ITEM 2.
Does this assistance request require State, or local advisory, educational or health clearances?

☐ Yes ☒ No (Attach Documentation)

Name of Agency or Board _____

ITEM 3.
Does this assistance request require clearinghouse review in accordance with OMB Circular A-95?

☐ Yes ☒ No

(Attach Comments)

ITEM 4
Does this assistance request require State, local, regional, or other planning approval?

☐ Yes ☒ No

Name of Approving Agency _____
Date _____

ITEM 5
Is the proposed project covered by an approved comprehensive plan?

☐ Yes ☒ No

Check one:
☐ State
☐ Local
☐ Regional

Location of Plan _____

ITEM 6
Will the assistance requested serve a Federal installation?

☐ Yes ☒ No

Name of Federal Installation _____
Federal Population benefiting from Project _____

ITEM 7
Will the assistance requested be on Federal land or installation?

☐ Yes ☒ No

Name of Federal Installation _____
Location of Federal Land _____
Percent of Project _____

ITEM 8
Will the assistance requested have an impact or effect on the environment?

☐ Yes ☒ No

See instructions for additional information to be provided.

ITEM 9
Will the assistance requested cause the displacement of individuals, families, businesses, or farms?

☐ Yes ☒ No

Number of:
Individuals _____
Families _____
Businesses _____
Farms _____

ITEM 10
Is there other related assistance on this project previous, pending, or anticipated?

☐ Yes ☒ No

See instructions for additional information to be provided.

PART IV

PROGRAM NARRATIVE

1. PROBLEM DESCRIPTION

NEED FOR THIS ASSISTANCE

In September, Massachusetts will implement legislation that may finally make it possible for handicapped youngsters to get a "mainstream" education. Under this law all children (ages 3 to 21) are entitled to receive appropriate education commensurate with their needs.

The new legislation represents "a shift in emphasis"[1] away from segregating special needs children in isolated, intact programs. School districts must now offer those children capable of instruction in a regular classroom access to educational alternatives within the regular public system. Yet, we find that school systems are not equipped to provide adequate programs.

Due to non-involvement in special education, school staffs lack the necessary skills for implementation of program alternatives that would mainstream the special needs population which has heretofore been segregated. Approximately 70% of school building principals have not had any preparation in special education course work. This is incongrurous with the direction that public school systems will need to take in implementation of Chapter 766.[2]

For this reason school systems have initiated an active search for alternative organizational strategies to provide services for the educationally handicapped. As school systems examine the many alternatives and possible learning environments for handicapped students, they will need much assistance and guidance along the way. There is also an immediate need for training programs since there is a lack of school system managers who are able to develop these necessary programs.

Although some school districts have sufficient resources to educate successfully even the severely handicapped child within a regular system, the basic problem remains. Primarily it revolves around the inability of existing systems to cope with individual variations in children's learning styles and characteristic behavior patterns. According to Commissioner Gregory Anrig, cited in Newsweek:[3]

> ...what this (766) means is that we are arriving at and filling an individual prescription for each kid--and that, after all, is what education should be for every child.

Some school districts have attempted to offer workshops for teachers or short-term inservice programs, but these efforts have been fragmentary and are not sufficient for the development of integrative systems.

The problem of integrating special education students within appropriate classroom placements is currently of vital concern to the MEC member communities.

The annual regional needs assessment study[4] conducted among the 10,000 educational practitioners in the area served by the Merrimack Education Center indicates special education as a high priority. Additionally, an in-depth structured interview technique, utilized with the superintendents in the Management Assessment Project,[5] listed special education and integration of special education students of very high concern. Yet a third survey by MEC in cooperation with the Massachusetts Council for Exceptional Children (DCLD) highlights inservice education for teachers and administrators as being of primary importance at this time. In light of school system needs and present state goals a major retraining effort is essential.

RESEARCH

Over the last decade federal agencies with major responsibilities for programs in special education have doubled their expenditures on a variety of research, training, demonstration, and service programs for handicapped children.[6] While dissatisfaction with segregated programs brewed for many years, a major change in philosophy for special/regular education occurred in the late sixties and early seventies.

Although innovative programs now exist in special education efforts to make information available for diffusion and implementation to local school systems are inadequate. Local practitioners simply do not know about the investments in R&D through such efforts as the Leadership Training Institutes, or Title III validated practices in special education, and do not have accessibility to EPDA training efforts that are occurring in other states.

The economic problems that arise when each community, unaware of national R&D efforts, attempts to carry out its own research, development and implementation programs are extremely impractical. Experience documented by R&D laboratories substantiates the belief that school personnel do not have adequate information about new developments and practices in special education. The availability of specific planning and management information capability to apply information from R&D to school system program development is lacking in most cases.

With the exception of the ERIC system, the ALERT curriculum information system, and isolated efforts by such organizations as the American Institute for Research (AIR) and EPIE (Educational Product Information Exchange), we do not have a systematic effort to bring successful practices in special education to local school system personnel.

In order to utilize the available R&D for special education practices, school systems would need to develop analytical capabilities to perform a summary of knowledge production and utilization. The local system does not possess this capability to support R&D functions or even to remain knowledgeable in the "state of the art". And, this is seen as a vital key to advancing school improvements in special education practices.

MEC has evaluated the gravity of the present situation and has recommended a collaborative solution.

According to Havelock, problem-solving comes about through the formation of relationships between user systems (local school systems) and resource systems (R&D efforts, college faculties in special education). It is exactly this process that is lacking.

Therefore, it is necessary for linking organizations to build a bridge between much of the work done by the special education field and the client school system practitioners. The linking organization, in the instance of this proposal, is a voluntary collaborative. The collaborative becomes the middleman or translator in this process of communicating R&D results to educational practitioners and assisting them through the steps of awareness, adaptation and implementation for integrative systems.[7]

This proposal specifies strategies for improvement where the emphasis is on the school system and the school building level as well as on the formation of leagues of schools which cross district lines forming "collaboratives".

Objectives of this proposal are therefore related to each school system's goals and objectives. Learning modules are designed and implemented which form the core of institutional inservice offerings.

Since user need studies guide the provision of resources this proposal will be concerned with targeting information to client consumers through staff development activities geared to actual consumer behaviors in utilization of new information. This process connotes certain problem-solving skills:[8]

> To coordinate helping activities with internal user problem-solving activities, the outside resource persons must be able to recapitulate or simulate the internal process...developing a good model of the user system in order to link to him effectively.

One means of managing the needs and resources, ideas and skills of school building staffs is, to build the problem-solving process using gaming and simulation techniques.[9] The complexity of the total system in which program implementation will be embedded calls for the integration of input from many practitioners...consultants and specialists.

Simulation brings together the teachers, administrators, college faculties, central office personnel to participate simultaneously in the staffing and operation of alternative organizational arrangements for special education. The gaming/simulation process meets many of the needs to stimulate communication while at the same time generating alternatives within a context of educational systems design.

The new Massachusetts law is similar to the plan in Texas described as a "shift in emphasis away from the serving of handicapped children by disability labels."[10] The principals training program developed at the University of Minnesota and tested through the Education Service Center in Austin, Texas meets the requirements for initial training efforts in Massachusetts. In the following sections describing the objectives and management plan for this proposal, we indicate how project staff will design and field test simulation activities that will be complementary to and build from the PTP training developed earlier with Maynard Reynolds at the University of Minnesota.

PROGRAM DESCRIPTION

In the following sections describing the objectives and the approach taken, a management plan indicates how project staff will design and field test simulation activities that will be complementary to and build from such training packages as the PTP training program.

This proposed project addresses the need of preparing regular classroom teachers and school system management personnel who will be providing instructional alternatives for children with special needs. The focus of the training project is, therefore, upon the training (i.e., retraining) of inservice educators in "regular" public school settings. According to Gallagher,[11] the training of regular educators is made more difficult "since there are few adequate models as to how resource room or itinerant teacher special educational programs are supposed to work."

The objective and management plan address the needs defined above. Briefly, the needs can be summarized to indicate that successful programs (for example the PTP) are not yet available to school personnel on an aggregate basis nationally. Additionally, local school personnel do not possess the necessary linkage and support capabilities to utilize the R&D practices of special education in their present formats.[12]

In this project, R&D efforts nationally identified will be assessed for how well they "fit" within local school systems and where modifications and adaptations need to be made. Following the analysis and synthesis of the identified resources for training, the collaborative agency may find it must create new resources. The regional organization then should be able to obtain and share these needed resources.[13] In an era of the "cost-crunch" when educational requirements almost always exceed available resources, a collaborative of colleges and school communities can facilitate change and help provide the new resources that change may require.[14]

OBJECTIVES

In creating and delivering new resources, a collaborative network of agencies structures diffusion activities to achieve the concomitant results of greater effectiveness and utility to greater numbers of school districts. To achieve this goal, the following specific objectives are proposed:

- To identify training needs of local schools through the assessment process,
- To inventory successful training practices in special needs for application to inservice education,
- To develop gaming and simulation training materials in selected high need areas where programs are non-existent,
- To implement training sessions through a college/community collaborative linkage model.

2. RESULTS AND BENEFITS

The benefits of this proposal are of several major types and are outlined as follows:

Impact - Utilizing the aggregate model of a collaborative and the training of trainers the multiplier effect will accrue a large and significant impact on areas comprising one-tenth of the State teaching population.

Innovative Qualities - The emphasis of the project is upon identifying what is successful with special effort devoted to not "reinventing the wheel". Projects such as the PTP program in Texas will be brokered into the area through the linkage model. Innovative efforts in developing new simulated activities will be undertaken only where programs are non-existent.

A major innovative outcome of the project will be the development of improved inservice dissemination models.

Commitments - Since the relationships between communities and the State College are already established within the Northeastern part of the State, the proposed project can begin immediately without the undue delay experienced by projects that are just recently initiated. Local superintendents of schools, make up the governance structure of MEC.

Encouraged by the State legislation of Chapter 753[15] these superintendents participate and are committed to improvements of education utilizing a collaborative approach.

Cost-Effectiveness -

Economies of scale - Utilizing the collaborative model where communities agree upon needs allows the application of resources whereby aggregation is utilized to lower cost. Training programs, therefore, are disseminated whereby programs are shared on a cost-effective basis.

Exchange economy - Training programs once developed are then available to communities on a low-cost State College tuition basis. This important link with the College combined with local inservice education budgets will enable project objectives to be sustained by the collaborative of local communities.

Product Outcomes - The results of this proposal will take the form of new educational products as well as processes for training programs to be made available for use within State training efforts. New product developments, in the form of gaming/simulation activities will be a major contribution to training efforts.

Below is a brief listing of products of this proposed study:

- A set of special education products/services screened for applicability to school district needs and appropriate for delivery via the collaborative network.
- A redesign of existing packages, modified and adapted and available for implementation.

- Twelve (12) games designed and tested for simulation activities in training.
- A process, that can be replicated, which enables local client systems to enhance their capacity to build self-renewal.
- Case study data on the application of the special education knowledge base in "regular" classrooms.

3. APPROACH OF THE STUDY

MANAGEMENT PLAN

The approach of the study is formulated to generate concepts into action steps as presented in the Activity Sequence Outline. There are three general phases to be considered:

1. A planning period (a) to secure the support of appropriate agencies and systems and, (b) to develop the plan of action based upon the interrelationships established through the networking of agencies.

2. The design period for field testing and modifying selected materials. Activities in this phase include the design of the simulation games as well as selecting delivery strategies, allocating resources and developing dissemination plans.

3. Exploration of dissemination strategies is comprised of the delivery to local schools. A model of training programs for training regional "facilitators" or trainers will provide school districts with a variety of delivery patterns for utilizing special education training services.

Within these three broad phases, the accomplishment of the goals and objectives will be based upon the following procedures:

OBJECTIVE ONE

To identify training needs of local schools through assessment process. Project staff will design and test an assessment process involving questionnaires and interview procedures to provide data for describing needs for special education resources.

Interviews and questionnaires utilized through the assessment process are ways of examining user behaviors in the staff development efforts. This data, in essence, provides a market survey in respect to diverse client systems. Additionally, the "market research" provides data on potential users of the special education information resources.

Information usage patterns in the market are identified by analyzing present use through survey methods (e.g., intensive data collection techniques; case study of use.) Through market analysis techniques, it is possible to identify user behavior, needs, and preferences.

The special needs inventory will be administered through twenty communities in the MEC collaborative. Data will be collected and priorities for high-need areas established. The eventual outcome will be a tested model for examining needs/resources relationships. A summary of needs and matching mechanisms enabling local personnel to select resources targeted to training needs will be developed and tested for usability. In this way products and practices developed by knowledge providing organizations are examined in reference to local school systems' capacity for utilization.

OBJECTIVE TWO

To inventory successful training practices in special needs for application to inservice education. The purpose of this inventory is so that the project will focus attention on the minimization of duplication of effort as well as point out needed areas of research where products and information do not yet exist.

The activities for this objective will entail four steps: (a) negotiation; (b) retrieval; (c) transformation; and, (d) communication.

a. Negotiation

Project staff assemble information on validated products and services; criteria will be evolved for use in selecting from among the R&D products those to be recommended for diffusion. The criteria are evolved from the "market research" in light of the available array of products. Staff analysis will be conducted followed by review by the advisory panel. This review of what funded projects have wrought, will be a major focus for evaluation and assessment. The panel reviews an eclectic array of products and services applicable to training needs in Massachusetts.

Consultants with appropriate capabilities in the areas of educational management, knowledge production and utilization, and special education will be members of the advisory panel.

b. Retrieval

The quality of decision making can be directly related to the quantity and quality of information utilized. Adequate development of special education programs within "regular" public school classrooms requires access to a broad range of national, regional, and local resources. An organizational linker, operating as the R&D arm of local school systems, can provide increased potential to cope with the problem of identifying resources to meet the needs.

The linking organization offers assistance in building the store of knowledge about ways to enhance successful application of special education processes. The purpose here is to retrieve program

descriptions from various information systems that will provide application of information content from R&D sources to the processes of instruction, management and operation of school systems.

R&D information will be accessed through a computer-assisted retrieval system. Using computer-assisted retrieval capabilities, the project staff conducts literature search of identifiable practices for inservice in special education.

The search will include the various information systems (e.g., ERIC, ALERT, TITLE III, CEC)[16] as well as selective mailings, and telephone communication interface. The MEC linking capabilities will be utilized to seek out R&D efforts relating to training in special education.[17]

c. Transformation

Project staff and consultants on the advisory panel review materials for possible selection and transition. The R&D efforts nationally identified need to be assessed for how well they "fit" within local school systems and where modifications and adaptations need to be made.

The framework developed will assist the panel in identifying which needs are being met and the needs that do not appear to be met by existing programs. Additionally, the specificationsof an appropriate needs/resources mix indicates how resources and the market requirements may be matched in the most effective ways.

The result will be a synthesis of knowledge production in training programs for special education...i.e., "the state of the art."

d. Communication

Project staff construct a scenario of each program for communication to the field through various publications. In order for practitioners to increase their capabilities, a planned, systematic effort to provide information resources for staff development programs is essential.

The criteria established (described above) provides a framework for coordinating the bulk of fragmented R&D efforts to make programs more accessible to inservice practitioners and field-agent professors. Provision of these resources to the field allows for testing practices and theories according to the framework within a "real" world context.

Information resources are communicated in formats that are potentially useful to those concerned with special needs practices in regular classrooms and public school systems. Presently the materials for

training are not developed to the level satisfactory for diffusion and implementation at the local level.[18] In addition to the catalogue and newsletter access, awareness workshops in the form of one-day conferences will be a major dissemination activity. These awareness conferences are further described in the activities planned for Objective four.

Until the time in Massachusetts when more educators in regular public school classrooms have been exposed to information and have access to data on successes and failures encountered the dollars invested in educational innovation have limited long-range effects.

OBJECTIVE THREE

To develop and design simulation materials that involve client practitioners. Greater involvement of participants is achieved when materials are recognized to be specifically applicable to the school environment. The visual aspects and communication concerning simulation require the use of games to objectify numerous arrangements through the manipulation of objects and verbal mediation. With the visual aid of physical objects, it soon is easier to express reasons for a set of complex variables and thus, to create alternatives.

Games teach the conceptual system on which the game is structured. Simulations deal with factors such as concepts, objectives, constraints, the testing out of alternatives, and decision making through judgments. The result is a remarkable enhancement of communication between specialists, teachers, and administrators.[19] An operational game is highly useful in opening up lines of communication, between teachers, administrators, school boards, and specialists as they translate values, interests and knowledge into a school system plan.[20]

Simulation is proposed for this training project since affective, cognitive, and psychomotor learning can be developed to a degree not common with more conventional instructional methods.[21] Additionally, learners are forced to solve problems rather than simply contemplate them, as is often the case in traditional instructional methods.

Project staff will research the design of gaming/simulation models and then games will be designed to deliver training sessions. Games are designed and written by local practitioners with the assistance of consultants and project staff. The games designed[22] will be tested for their effectiveness in stimulating group discussions in the inservice programs, faculty meetings, and in conjunction with decision making and role playing as well as other simulation activities.

OBJECTIVE FOUR

To implement training sessions through a college/community collaborative linkage model. Through a unique blend of partnerships between the Fitchburg State College and the Merrimack Education Center inservice training for principals, unit leaders, and teachers is offered. Training in various alternative organizational arrangements for special education enables school system managers to develop skills and generate educational alternatives for "integration: and for "fusion"[23] to occur.

The vehicle for this objective is the collaborative linking multisite, multi-form organizations which bring together a network of

the R&D world and the practice world. The linking network is formed from among participating schools, colleges, and regional agencies to provide ongoing teacher training, resource coordination and information exchange. Linking and support methologies, tested under the MEC LINKER Project (NIE funded) will be utilized to broker innovative systems aimed at intensifying local awareness of nationally validated successful practices in special education.

a. Identify and train 18 "trainers" (college faculty and practitioners). Experienced professionals, who possess the capabilities to become peer consultants, serve in a change-agent consultant role to assist with problem-solving in local systems. The persons to be selected are peer-level consultants. Thus a superintendent of schools would provide information for another superintendent group, a principal would serve as a training facilitator for a group of principals.

Peer level consultants contribute from the experiential base of having themselves implemented or utilized the training programs in their own school system staff development programs. Peer level consultants are trained as "trainers" to assist other schools in the collaborative.[24]

The training of leadership persons will be carried out with the assistance of special education faculty of Fitchburg State College. A committee of faculty members is available to collaborate on this proposal with MEC and the school systems to be served. School system practitioners can elect to receive graduate credit through the college for successful completion of th eir off-campus course work.

Peer-level consultants are trained as change agents to deliver the training simulations written by educational practitioners. The training of peer-level consultants includes observational and participatory activities of the problem-solving, simulation materials designed. Peer level trainers evidence complete familiarity with the implementation strategies of product support and change support [25] as well as the stages of the change process identified by Havelock.[26]

b. Conduct a series of overview/awareness sessions (in three locations) for approximately 300 teachers. Potential participants of local school system inservice programs are provided sufficient awareness information about programs to enable them to decide upon selection and implementation. This awareness level (one day conference) initiates the series of steps wherby inservice training programs can address the issues of implementation.

c. Demonstrate a linking model delivery of inservice education on a cost-effective basis. The peer level consultants (principals, superintendents, special educators, unit leaders, and classroom teachers) provide a cadre of problem-solving support teams. These teams are available to provide on-site training programs for local school districts. Programs offering 1 1/2 credits (16 class hours) will be offered in 30 to 40 locations. One thousand persons will be trained.

Programs of joint faculty appointments for acquiring commitment of college faculty for sustained R&D in the school settings will be established. The appointment of clinical professors to the field as "field-agent" professors and the appointment of the leadership personnel (peer level consultants from local school systems) as adjunctive college faculty strengthens the mutual goals of the respective organizations.

Additionally, joint support programs provided by state and local agencies will share the cost of faculty, university, internal and external resources for problem-solving inservice education models. Such a formula might include 1/3 local support and 2/3 state support ultimately. This study will come up with recommendations as to how such a formula might work in the future. [27]

Inservice programs are offered for teachers, with graduate credit, in the school and during the school day. Professor field-agents are on-site to determine staff training needed to implement promising concepts in the "real" world thus involving academicians and professional teachers in adapting programs to meet school system goals.

Successful achievements in the field-testing of the simulation/training materials will be "brokered" to new and emerging collaboratives on an exchange economy basis. Project staff will provide assistance to these new collaboratives on alternative delivery mechanisms for inservice education models.

ACTIVITIES SEQUENCE OUTLINE

OBJECTIVE ONE

- Design special needs inventory form
- Administer through 20 communities
- Collect data
- Establish priorities

OBJECTIVE TWO

- Negotiate...build criteria for review/search strategy
- Retrieve program descriptions, (ERIC) documents, materials Title III, etc.
- Review materials for possible selection and transformation by advisory panel
- Communicate...construct a scenario of each program for communication to the field through catalogues, announcements, and, through the awareness workshops.

OBJECTIVE THREE

- Determine priority where simulation materials are needed
- Establish exercise (simulation) writing teams
- Conduct training session for writing teams
- Design 12 prototype games for simulation training and field test the designs
- Produce necessary debriefing worksheets (materials) for regional program dissemination

OBJECTIVE FOUR

- Identify potential trainers (college faculty and practitioners) linking colleges and communities
- Conduct a series of overview (awareness) sessions through existing and emerging collaboratives
- Provide resource assistance (through peer consultants) to users on alternative inservice models
- Disseminate the college community inservice model to a new cooperative

EVALUATION

- Document through case study format the processes used
- Submit final report of evaluator

TRAINING SYSTEM LINKAGES

Figure 1, on the following page depicts the organizational linkages necessary to carry out the four objectives and subsequent activities.

Actual training programs will be conducted through a three-phase program over the one year project duration.

- Phase I

  *Identify and train the 18 "trainers" (faculty from college; field agent professors assist with training of local practitioners)

- Phase II

  *Offer awareness sessions in 3 locations; 2 MEC communities; 1 in new cooperative

  *Approximately 300 teachers attend these 1-day overview conferences

- Phase III

  *Initiate training programs in approximately 40 locations

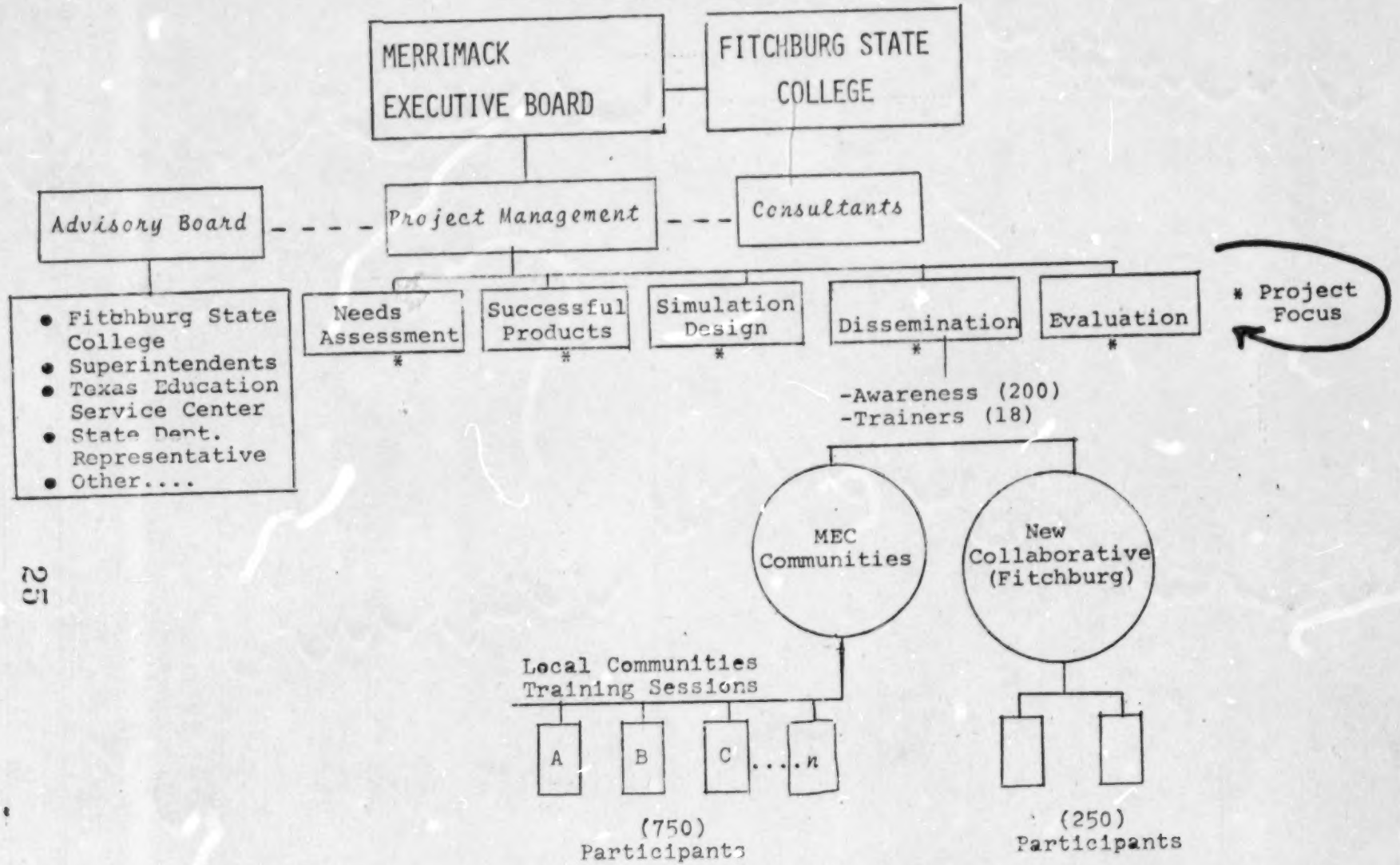
  *Course offerings consist of 16 class hours (1 and 1/2 graduate credits)

  *Total population trained = 1000 to 1200

  *Emerging collaborative develops its own cadre of trainers (12 - 18)

FIGURE 1

TRAINING SYSTEM LINKAGES



COOPERATING AGENCIES

A. Executive Board

The Merrimack Education Center, Executive Board of superintendents elected from the region, will serve the governance functions of this proposal. The Town of Chelmsford is the Local Education Agency. (See lising in Section 4.)

B. A second group, the Advisory Panel, will be established comprising representation from such agencies as:

Local education Agencies and non-public schools (administrators, unit leaders, teachers)

Massachusetts State Department of Education (Northeast Regional Office)

Fitchburg State College (Professor Field Agents from special education faculty) (See letter in Appendix A)

Consultants from...

A.D. Little, Inc.
Texas Education Service Center
University of Minnesota

STAFFING : Professional Personnel

Project Director..the principal investigator, Dr. Richard J. Lavin is the Executive Director of the Center. He will oversee total administration, operation and coordination of this project including key personnel and finances. This includes liaison with school district and college faculties providing inter-system management of the collaborative arrangements. He oversees implementation, inservice training, evaluation and dissemination of the project (including needs assessments).

Project Coordinator

Responsibilities include staff consulting with advisory panel, coordination of staff development program; maintains careful records documenting implementation practices and experiences. Identifies through Query, Dialogue and SDC/Inform search systems the national successful practices. Maintains liaison with Council for Exceptional Children clearinghouse files.

CONSULTANTS

Five professor field agents serve to link inservice activities of respective school systems, project management and college. Field agents are college-based and are appropriately assigned to member communities. Field agent professors assist with training of "trainer/consultants and in on-site awareness conferences and training institutes. They consult with the 18 trainers on delivery of the training program.

The design consultant will assist with the needs/resources matrix and application of criteria to the choice of verified special education products. The design consultant will provide valuable input in the formative stages of the project for interpreting needs assessment, designing the simulation training materials. Dr. Donald Meals (see brief resume located with the Project Personnel resumes) has designed and tested simulation materials in cooperation with Dr. Richard J. Lavin, the project director. These materials referenced in the footnotes to this proposal describe the Chelmsford Park High School planning model.

The program evaluator assists with development of the concepts and content for the training program. He will determine the amelioration of the needs identified in the needs assessment through the various project activities. The evaluator performs an independent audit and submits a report of the project.

EVALUATION

Evaluation is conducted against the four major objectives of the project: Level A (objectives one through three) will be an evaluation of the product/program objectives. Level B (objective four) will examine the process of the delivery system and the inter-system management of the project.

Level A-Programs selected or developed locally for special needs training will be evaluated utilizing a comparison of data from the needs assessment instrument to data collected from the specific course offerings. Sampling of data will determine client/user familiarity on a pre-post analysis. Need alleviation will be utilized as a measure of success in the program offerings. Specific designs will be constructed by the consulting organization of the Texas Education Service Center.

EVALUATION (continued)

Level B - The process objectives of the project will be evaluated through a case study documentation process. A framework will be developed whereby data will be gathered against a set of questions that will then be available as a product of the study for future comparative analysis. This analysis can be utilized for either longitudinal study or comparative analysis with other training centers.

4. GEOGRAPHIC LOCATION

The collaborative project serves a geogrpahical area in Northeastern Massachusetts that includes twenty (20) contiguous cities and towns in addition to several regional vocational and technical high school districts. Each of the school districts is within 20 to 25 minutes (driving time) of the Merrimack Education Center.

This area, with well over 300,000 people, includes approximately 100,000 public school student enrollment; over 10,000 professional educators are served by the Merrimack Education Center.

While the population of the suburbs continues to grow, school enrollment has started to level off. The urban population in the area has experienced unemployment at the highest levels recorded in the Commonwealth and suburban workers have been affected by changes in government-supported industry contracts in the area. In the City of Lawrence, the percentage of population of minority groups has increased (notably Spanish-Americans). Additionally, the City of Lowell has directed a request to the MEC Executive Board to become a member community in September, 1974, which will increase the population of students and professional educators served.

5. PROJECT PERSONNEL

PROJECT DIRECTOR

Dr. Richard J. Lavin, Executive Director
Merrimack Education Center
101 Mill Road
Chelmsford, Massachusetts 02184

(617) 256-3985

Dr. Richard J. Lavin is Executive Director of Merrimack Education Center. He is broadly experienced in educational administration, teaching, consulting and research.

Dr. Lavin has spent the past six years as Executive Director of MEC, a collaborative, founded in 1968 and located in Chelmsford, Massachusetts. The Center serves a group of twenty contiguous cities and towns in Northern Massachusetts with a total student population of approximately 100,000 from public and non-public schools. With the capabilities of the Center's professional staff, Dr. Lavin has directed and implemented major educational programs and projects in Early Childhood, Handicapped Children, Early Career Guidance, Staff Development Graduate Study Courses and Programs, School Boardmanship, Needs Assessment, Information-Knowledge Utilization, Individually Guided Education-IDEA-Kettering, and the Northeast Education Management Development Center.

Dr. Lavin served on the faculty of Boston University teaching Educational Finance. He has consulted for U.S.O.E., Washington; Systems Development Corporation, Virginia; Arthur D. Little, Inc., Cambridge; and has conducted numerous educational studies throughout the New England area.

While at Harvard University, Dr. Lavin held the position of Business Manager. He subsequently taught School Business Management and Educational Finance at Boston College, Chestnut Hill, Massachusetts. Prior to joining the Raytheon Education Company of Lexington as Director of Educational Services and Systems, Dr. Lavin served Wayland Public Schools, Wayland, Massachusetts, for a period of six years, as Assistant Superintendent and then Acting Superintendent.

He has served on various committees at the State level including: Governor Francis Sargent's (comprehensive study) for School Reorganization and Collaboration and the Advisory Council for Vocational and Technical Education. He also assisted the Massachusetts Advisory Council for Education (MACE) Studies in Early Childhood, and the Comprehensive High School and the C. F. Kettering Foundation on a major study of Educational Management Development practices.

Dr. Lavin has developed and tested a new gaming simulation technique for educational planning and has authored many educational articles and publications. He holds the degrees of Bachelor of Science in Education, Holy Cross College, Worcester; Master's in Business Administration (MBA), Babson College, Wellesley; and Doctor of Education, Boston University, Boston, Massachusetts.

Publications

"Organizing for Improving Delivery of Educational Services in Massachusetts. A Process Approach to the Development of Regional Educational Delivery Systems in Massachusetts." The Governor's Commission on School District Organization and Collaboration.

"Synthesis of Knowledge and Practice in Educational Management and Leadership." C. F. Kettering Foundation, August, 1973.

ERIC ED 024 237. "Chelmsford Park High School. Planning Model for School Facilities." 1969.

ERIC ED 069 602. "An Innovative Approach to Public School Staff Development." September, 1972.

"Simulation, Standards, and the Seventies," School Library Journal. November, 1969.

"Early Childhood Education Center. School Planning Exercise, Simulation Game." Merrimack Education Center, Newsletter, August, 1969.

"MEC, the Educational Middleman," Industry. The Mitre Corporation. March, 1971.

Dr. Donald Meals
Arthur D. Little, Inc.
Acorn Park
Cambridge, Massachusetts

(617) 864-5770

Dr. Donald Meals is currently a management consultant at Arthur D. Little, Inc., in Cambridge where he provides systems and applications assistance to industry, government and education.

Prior to joining Arthur D. Little, Dr. Meals served as Vice President of the Research Division of Tech/Ops in Burlington. For several years he was manager of Systems and Applications of Raytheon Company.

Dr. Meals is widely experienced in education and psychology as well. He has supervised research and training of graduate students in Clinical Psychology at Philadelphia General Hospital and has participated in child guidance services in the Philadelphia Clinic.

At the University of Pennsylvania and Dickenson College, he was instructor for five years. His affiliations with MIT and Harvard have included research and faculty appointments.

Dr. Meals received his Ph.B. in Sociology and Mathematics at Dickenson College; M.S., University of Pennsylvania, Psychology. Public Health Fellow, Philadelphia General Hospital and a Ph.D. at the University of Pennsylvania.

Publications

"Improving the Combat Effectiveness of Rifleman," with A.N. Colby, S-64 (Operations Research Office).

"Strength and Weakness in the Performance of Rifleman in Korea", With A.N. Colby, S-593 (Operations Research Office).

"Trends in Military Operations Research", Operations Research, 9, 25 - 257 (April, 1961).

"Heuristic Models for Systems Planning", Phi Delta Kappan, Jan. 1967.

Developed and Tested the following instructional games:

"Querie I" and "Querie II" for data processing system users.

"On-Sets" for school children and adults learning the "new math".

Ms. Jean E. Sanders
Director - Research and Information Services
Merrimack Education Center
101 Mill Road
Chelmsford, Massachusetts 02184

(617) 256-3985

Before assuming the present role, Ms. Sanders was Coordinator of Special Education at the Center. The duties and responsibilities primarily involved the design and implementation of staff development programs for teachers in the area of special education.

Ms. Sanders has been involved in the implementation of the IGE League of schools since 1970, primarily in the area of reading curriculum through planning and instructing workshops and staff development projects utilizing the Wisconsin Design for Reading Skill Development. Prior to joining the MEC staff, Ms. Sanders served as graduate assistant to Boston University and on the adjunctive faculty there.

Ms. Sanders has offered courses on the adjunctive faculty of Lowell State College, Fitchburg State College, and Regis College in the special education graduate programs. Presently she is chairperson of the Research Committee for the Mass. Council for Exceptional Children; the Division for Children with Learning Disabilities.

In 1968-1969, Ms. Sanders designed and implemented the reading programs for the Sudbury Junior High School. She is also broadly experienced in elementary education having evaluated Title One reading projects and having taught elementary school for eight years.

Educational background includes a B.S. from State College at Worcester; an M. Ed. in Reading at Northeastern University, and a Certificate of Advanced Graduate Study from Boston University in special education where all requirements for the doctoral degree have been met except the doctoral dissertation.

Publications

"Intersensory Learning", In. Serwer, et. al. Experimental Model School Program for Children with Specific Learning Disabilities. ESEA VI Project #70-309-018.

ERIC ED 058 161. "A Systematic Approach to Inservice Training for Teachers in Learning Disabilities." April, 1972.

ERIC ED 075 967. "Preparing Educators in an Inservice Program in Learning Disabilities. A Field Study Report." March, 1973.

ERIC ED 064 844. "Learning Styles: A Booklet for Teachers and Unit Leaders."

ERIC ED 086 698 (Compiler). "New Partnerships in Teacher Education: A Regional Conference."

ERIC ED 085 335. "Training Programs for Instructional Assistants in Learning Disabilities" A guidebook for Trainers."

Dr. Rosemarie Giovino
Special Education Department
Fitchburg State College
Fitchburg, Massachusetts 01420

Dr. Rosemarie Giovino is Associate Professor of Special Education at Fitchburg State College. She was largely responsible for implementing a non-categorical model of teacher preparation entitled the "fusion curriculum" which is operational in five local communities. Prior to joining the Fitchburg State faculty in 1971, Dr. Giovino spent six years as Assistant Professor in the Elementary Education Department of Lowell State College. The responsibilities included teacher preparation in the areas of reading and early childhood.

Dr. Giovino is piloting the Principal Training Program in the MEC communities this semester. She has served as a consultant in the staff development programs in learning disabilities offered by the Center for inservice teachers. She serves on the adjunctive faculty of Boston State College and has consulted for local school systems on teacher inservice programs.

Dr. Giovino is chairperson of a six-member committee at the College to build effective linkages between the College and MEC communities. She is also serving on committees to fuse special education and elementary education programs for pre-service teachers. Duties and responsibilities involved design and implementation of the preparation programs within a field (community) model.

In 1970, Dr. Giovino served on the adjunctive faculty of Boston University and as a graduate assistant in the reading department. She is also broadly experienced in elementary education and early childhood. She taught elementary education in Medford Public Schools and directed the reading programs for the City before joining the college faculty.

Educational background includes a B.S. from Lowell State College; an M.Ed. in Reading (Boston University) and a Ed. D. in reading and special education (Boston University, 1970).

MERRIMACK EDUCATION CENTER

CAPABILITIES STATEMENT

The Merrimack Education Center (MEC) began in 1968 as an organization for the purpose of initiating change in twenty school districts of the Merrimack Valley in Northeastern Massachusetts. Originally funded under Title III, ESEA, MEC has since moved into a position of being supported equally by the school districts which it serves and by state and federal monies.

Over its five year history MEC has served in the capacity of investigating the collaborative concept in education as it relates to pooling resources and shared service centers. Utilizing an all too-limited set of resources for education remains a challenge in the process of change.

The MEC approach comes from the grass roots of education and joins school systems in a voluntary sharing relationship. MEC is governed by a board of Superintendents who meet regularly to ascertain regional needs and to seek out resources that might assist communities in offering new programs.

Historically, the MEC communities have demonstrated a continuing commitment to the financial support of successful programs through local contributions. This capability to sustain programs that are proven is a measure of success for the joint collaborative efforts.

MEC plays the role of educational "broker" linking the school districts with external resources at the local, state and national levels. Services and products from the Center stem largely from four major program areas: staff development, Individually Guided Education, information systems, and educational management development.

Client needs are formally assessed on an annual basis; the Center responds to these articulated needs by providing inservice courses to teachers and administrators and by making information packages available in high need areas; 2500 teachers have participated in MEC initiated inservice education programs (accredited by Fitchburg State College and its Graduate Division). MEC offers a source of information through the ERIC subscription service and acts as a consultant to educators trying to put theory into practice through its Project Linker (NIE funded, 1971-1973).

Through the League of IGE Schools (Project LEAGUE, Title III ESEA) the area of individualization is a focal point for innovative reorganization. Individualization emerged as a need early in the life of the Center and this interest resulted in the formation of the League in 1970. Presently, the Center serves 35 schools in Massachusetts who are implementing Individually Guided Education. IGE is a system of education designed to accomodate individual differences among students through alternative instructional and organizational arrangements. The IGE system came into being as a result of research

done at the Wisconsin Research and Development Center for Cognitive Learning and I/D/E/A -- the Institute for the Development of Educational Activities, Inc. established by the Charles F. Kettering Foundation in 1965.

Recently the need for the development of skills in leadership and change management for administrative personnel has been identified. The area of management and school organization is seen as a long-range area of high priority for the school systems in the MEC region and is being responded to by the Center in several ways. Strong ties with local colleges and universities have been effected enabling the Center to sponsor inservice programs for principals and other "middle management" levels. The Center has been designated by the C.F. Kettering/IDEA Foundation as the Northeast Educational Management Development Center and is initiating activities as a means of strengthening educational management among the client communities served.

Staff

The full-time staff of MEC is skeletal by design. The Executive Director, Dr. Richard J. Lavin, is assisted by his Associate Director, Dr. Leslie C. Bernal. Ms. Jean E. Sanders directs the research and information services; Mr. William A. Hassey acts as coordinator of Educational Services.

A wide range of regular consultants devote energies to specific projects and programs. These include Dr. Donald Meals, Arthur D. Little Inc.; Dr. Ronald Havelock, (CRUSK) University of Michigan. A staff of college professors provides the resources for inservice programs along with adjunctive faculty. A field agent assigned by the MEC works with principals and teachers while a second field agent establishes parent advisory committees in IGE schools.

MERRIMACK EDUCATION CENTER

EXECUTIVE BOARD

Dr. Kenneth Seifert (Chairman)	Andover
Mr. Lloyd Blanchard	Westford
Mr. Peter Garofoli	No. Andover
Dr. William Holland	Lunenburg
Mr. Thomas Lafionatis	Nashoba Valley Voc. Tech.
Dr. Charles Lamontagne	Woburn
Mr. Walter Pierce	Wilmington
Dr. Thomas Rivard	Chelmsford
Dr. Foster Shibles	No. Middlesex
Mr. Maurice Smith	Lawrence
Mr. John Wynn	Tewksbury
Dr. Paul Zdanowicz	Methuen

ASSURANCE OF COMPLIANCE WITH THE DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE REGULATION UNDER TITLE VI OF THE CIVIL RIGHTS ACT OF 1964

Richard J. Lavin, Ed.D. (hereinafter called the "Applicant")
(Name of Applicant)

HEREBY AGREES THAT it will comply with title VI of the Civil Rights Act of 1964 (P.L. 88-352) and all requirements imposed by or pursuant to the Regulation of the Department of Health, Education, and Welfare (45 CFR Part 80) issued pursuant to that title, to the end that, in accordance with title VI of that Act and the Regulation, no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department; and HEREBY GIVES ASSURANCE THAT it will immediately take any measures necessary to effectuate this agreement.

If any real property or structure thereon is provided or improved with the aid of Federal financial assistance extended to the Applicant by the Department, this assurance shall obligate the Applicant, or in the case of any transfer of such property, any transferee, for the period during which the real property or structure is used for a purpose for which the Federal financial assistance is extended or for another purpose involving the provision of similar services or benefits. If any personal property is so provided, this assurance shall obligate the Applicant for the period during which it retains ownership or possession of the property. In all other cases, this assurance shall obligate the Applicant for the period during which the Federal financial assistance is extended to it by the Department.

THIS ASSURANCE is given in consideration of and for the purpose of obtaining any and all Federal grants, loans, contracts, property, discounts or other Federal financial assistance extended after the date hereof to the Applicant by the Department, including installment payments after such date on account of applications for Federal financial assistance which were approved before such date. The Applicant recognizes and agrees that such Federal financial assistance will be extended in reliance on the representations and agreements made in this assurance, and that the United States shall have the right to seek judicial enforcement of this assurance. This assurance is binding on the Applicant, its successors, transferees, and assignees, and the person or persons whose signatures appear below are authorized to sign this assurance on behalf of the Applicant.

Dated May 3, 1974

Richard J. Lavin
(Applicant)

By Executive Director
(President, Chairman of Board, or comparable authorized official)

101 Mill Road

Chelmsford, Massachusetts 01824
(Applicant's mailing address)

HEW-441
(12-64)

FOOTNOTES

[1]D. Hafner, "A Shift in Emphasis in Programing for Handicapped Children," Exceptional Children, September, 1972. pp. 59-60.

[2]Commonwealth of Massachusetts. Chapter 766. The "Bartley Daley Bill.

[3]Commissioner of Education - Massachusetts , cited in Newsweek.

[4]MEC, since 1970, has conducted an assessment of needs annually to identify individual as well as group needs of teachers, administrators, and school boards. These data result in need clusters which pertain to certain levels, subjects, specialties, etc.

[5]Management Assessment Project is a program by the Northeast Educational Management Development Center, a Kettering Foundation funded unit of the Merrimack Education Center.

[6]J. Gallagher, "Phenomenal Growth and New Problems Characterize Special Education," Phi Delta Kappan, April, 1974, pp. 516-520.

[7]National Institute of Education, "Building Capacity for Renewal and Reform," December, 1973.

[8]R. Havelock, "The Change Agent's Guide to Innovation in Education," New Jersey: Educational Technology Publications, 1973.

[9]R. Lavin, "Simulation, Standards, and the Seventies," School Library Journal, November, 1969.

[10] D. Hafner, op. cit.

[11]J. Gallagher, op. cit.

[12]National Institute of Education, op. cit.

[13]D. Meals, "Organizing for Improving Delivery of Educational Services in Massachusetts. Volume I: A Process Approach to the Development of Regional Educational Delivery Systems in Massachusetts." A. D. Little, Inc. submitted to The Governor's Commission on school District Collaboration. Massachusetts Advisory Council on Education, Boston, Mass. 1974.

FOOTNOTES

[14] F. Rosenau, and J. Hemphill Eds. Educational Development: A New Discipline for Self-Renewal." Eugene, Oregon: CASEA, 1973. This concept is identified in terms of two types of support: change support and product support.

[15] Chapter 753. Joint Educational Programs. "School committees may expend monies received from the Commonwealth or other towns for joint educational programs without appropriation or credited to general revenue. Previously the school committee of the host town had to request full funding for such programs because monies received from other towns had to be appropriate by the treasurer."

[16] For example, Title III ESEA projects which have received Pacesetter Awards in special education. Other programs to be communicated to practitioners include Leadership Training Institute projects funded by the Bureau of Education for the Handicapped under Public Law 91-230 Title VI, Part G. Similarly, training materials developed through grants by the National Center for the Improvement of Educational Systems, Division of Training Programs.

[17] The LINKER Project (funded by NCEC now reporting to NIE) demonstrates MEC capability in this area of expertise.

[18] PROJECT LEAGUE, IGE (Individually Guided Education) funded by Title III ESEA demonstrates the MEC capability in this area. See also, Capability Statement included within this proposal.

[19] D. Meals, "A Process Approach to Systems Design." Arthur D. Little, Inc., Cambridge, Massachusetts, 1973.

[20] R. Lavin, "Simulation, Standards, and the Seventies," School Library Journal, November, 1969.

[21] The use of simulation in the social sciences has been discussed by Twelker, (1970) and Meals , (1973). Literature on the applications of simulation to the study of government, international relations, law, and other social science-based professions is extensive. Several authors have indicated the advantages and disadvantages inherent in the use of simulated materials. P. Twelker, "Educational Simulation/ Gaming." ERIC ED 064 955.

[22] R. Lavin, "Planning Model for School Facilities. Chelmsford Park High School." CHelmsford, Massachusetts. A Planning Model for Secondary School Utilizing a Multi-Dimensional Approach for Optimum Flexibility," ESEA Title III. (Grant No. oeg-3-7-703509-4012). September, 1968. ERIC ED 024 237. (Example is found in Appendix C)

FOOTNOTES

[23]Fusion is the name used to describe the non-categorical training of special educators developed by Fitchburg State College and operating in five communities.

[24]R. Wynn, "Unconventional Methods and Materials for Preparing Educational Administrators," ERIC /CEM -UCEA. Series on Administrator Preparation.

[25]F. Rosenau and J. Hemphill (Eds.) op. cit.

[26]R. Havelock, op. cit.

[27]G. Anrig, "New Partnerships in Teacher Education." Speech by the Commissioner at the Andover Conference sponsored by Merrimack Education Center in cooperation with the Sears Roebuck Foundation Project and the University of Wisconsin, November, 28, 1973. ERIC ED 086 698.

APPENDIX A

The Commonwealth of Massachusetts
Fitchburg State College
Fitchburg 01420

OFFICE OF THE PRESIDENT

April 30, 1974

Dr. Richard Lavin, Director
Merrimack Education Center
101 Mill Road
Chelmsford, Massachusetts 01824

Dear Dr. Lavin:

Fitchburg State College supports with enthusiasm the EPDA Cooperative Project proposal to improve training through a State College-Collaborative Link in in-service education.

A brief scenario is attached which describes Fitchburg State College's and Merrimack Education Center's cooperative activities since 1971.

The recently enacted Chapter 766 legislation in Massachusetts emphasizes a high need for new and improved training programs. School systems are attempting to implement the integration of special needs children into the school environment and are requesting assistance. Our existing ties with the "Shift of Emphasis Project" in Texas and the objectives proposed in the Merrimack Education Center's project are consistent with a systematic approach to developing and disseminating that which is successful to the school systems of Massachusetts.

We are pleased to be part of this very worthwhile project.

Sincerely,

James J. Hammond

James J. Hammond
President

Enc.
JJH:f

Cooperative Relationship Between the Merrimack Education Center and Fitchburg State College

In 1971 Fitchburg State College was requested by the Merrimack Education Center to join with this Center servicing school districts in the Merrimack Valley in the in-service programs which would be offered for personnel from these districts and for which graduate credit could be available. About this same time the Merrimack Education Center, in seeking to service its own League of IGE (Individually Guided Education) schools, invited certain administrators of Fitchburg State College to participate in planning seminars for the introduction of this process to the new League of elementary schools.

Out of these requests has developed an actual process of collaboration between the Merrimack Education Center (MEC), Fitchburg State College and its McKay Campus School. Along with the linking of school systems in a college-supported IGE League together with the MEC network, administrators at the College collaborate with the Executive Director and staff of MEC in reviewing ongoing programs, in planning upcoming programs, in exploring and sharing resources and in arranging conferences, workshops, clinicals and seminars.

The Merrimack Education Center serves in the role of a contact, a communications center, a bridge, and a linker, broker or agent between the College and the school districts which are members of MEC, as well as other groups to whom the College might provide professional services.

The College provides graduate credit for in-service courses designed to meet the needs of MEC constituents. The fourth annual needs assessment of the 6,000 teachers and administrators serving 100,000 students in 22 school districts in the Merrimack Valley has just been completed. As had occurred during the past three years, these responses are then analyzed by computer and the preferences and needs requested for in-service programs in the field are generated. In the past two-and-a-half years 1200 teachers from the Merrimack Valley have taken in the field 60 in-service courses that have been offered in Fitchburg State's graduate program as a direct result the needs assessment made by MEC. In addition to the needs being met in the field rather than teachers always having to travel to the institution of higher education, this process has also generated other flexibilities in Fitchburg State's graduate program. Whether workshops, courses or institutes, the time frames have been tailored to meet the needs of educators in the field. All-day sessions, three-day sessions, evening seminars, Saturday institutes or semester-long courses have been developed. Modules allowing for one credit, one-and-a-half credits or three credits have also given greater flexibility to this program. Selected Fitchburg State faculty who have expertise in areas of expressed need teach some of these in-service courses.

The McKay Campus School is a member of MEC's IGE League of 13 elementary schools and the College directs the Central Massachusetts IGE League, consisting of nine elementary schools in the central part of the State, which is an offshoot of MEC, and a direct linkage in the MEC network. In addition, the College is working collaboratively with MEC in articulating the IGE Middle School system by the clinical sessions for teachers and administrators held at its Teacher Center and by the development of the IGE Middle School plan at its McKay Campus School.

The College and MEC are further linked together through the joint appointment of personnel coordinating the efforts of both agencies. Fitchburg State and MEC have also developed and submitted grants jointly. Staff members of MEC teach appropriate courses in the collaborative in-service program. Personnel with special expertise who teach in the school districts served by MEC also teach in these in-service programs.

Both institutions have certain resources such as the ERIC microfiche and some hardware which can be used jointly. The College uses the computer capability that MEC has, and trains its staff in the fuller development of microfiche capability by working with MEC. Thus a pooling of both personnel and resources occurs between the agencies.

Students in Fitchburg State's pre-service programs in early childhood, elementary education and special education experience their practicum, including student teaching, in a number of IGE schools in the MEC League, as well as in the Central Massachusetts League. Thus deliberate direction is being given to establishing a blending of pre-service and in-service teaching education occurring in a realistic setting in the field. This closer relationship of the College and the local school systems facilitated by MEC has resulted in Fitchburg State's moving more of its undergraduate and graduate courses into the field, thus giving a more valid and more valuable experience to its students.

This experience of the College staff moving into the community, as has occurred with the Special Education Fusion program, has resulted in the programs being developed in a live setting, with a greater flexibility in the location of the course offerings, the times when they are offered, and the modules of credit which are granted. In the Merrimack Valley, for example, a one-and-one-half credit module was held for three successive days last fall for superintendents and building principals re: Implementation of Chapter 766. 40 administrators left the three-day session with their skills and learning packages developed at and presented by personnel from the University of Texas at Austin and ready to be put into action at the building level. This is being followed up on by the eight-session one-and-one-half "mod" for classroom teachers this spring so that implementation is occurring on the building and classroom levels.

In summary, the relationship between the Merrimack Education Center and Fitchburg State College during the past three years has been marked by closer communication and linkages, better addressing of needs, more stress on accountability and greater specification of educational objectives. Thus stronger partnerships have developed between the College and the school districts through the Center, facilitating renewal of education in this central region of the Commonwealth.

APPENDIX B

merrimack education center

The Merrimack Education Center's Executive Board of Superintendents approved on Thursday, January 31, 1974 the following institutional in-service program offering for local schools.

The enclosed material provides an outline for a special education program in response to the concerns of local school systems regarding implementation of Chapter 766 and provision for needs of special education populations.

The focus of the program is on local practices and implementation strategies. The purpose of this letter is to provide your school system an opportunity to sponsor a local in-service program for principals, special educators, or members of the core evaluation team. Principal Training Program is complete with a media-oriented approach; the format includes small group, individualized and independent study, readings, discussions, and problem-solving sessions. The workshop requires full participation of local school personnel working with a qualified instructor identified by MEC.

An option of 1-1/2 credits can be arranged for participants who complete the sessions. If you do not have twenty persons to sponsor a program in your community we will help you arrange a cooperative program with a community in your area so that your staff may attend.

Your early reply to this offering will enable us to schedule your community's workshop before the end of the year. Please complete the enclosed response form and return it to the Center. We will contact you as soon as we are able to schedule the first session you have indicated.

Sincerely,

Jean E. Sanders

Staff

Richard J. Lavin, Executive Director
Leslie C. Bernal, Associate Director
Jean E. Sanders, Director-Information Service
Francis J. Pilecki, Director-Staff Development

Executive Board

Kenneth R. Seifert, Andover
Frederick Riel, Billerica
Thomas L. Rivard, Chelmsford
Maurice Smith, Lawrence
Richard E. Desjardsis, Littleton
William R. Holland, Lunenburg
Paul Zdanowicz, Methuen
Thomas Lafionatis, Nashoba Valley Tech
Peter Garofoli, North Andover
Walter Pierce, Wilmington
John W. Wynn, Tewksbury
Lloyd Blanchard, Westford

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(617) 256-3985 256-3986

PRINCIPALS TRAINING PROGRAM *

OVERVIEW

This special education program is a direct response to the concerns of local school systems regarding the program implementation of Chapter 766 and provision for needs of special education populations.

The focus of the program is on local practices and implementation strategies. The purpose of this program is to provide an opportunity for you to sponsor a local in-service program for principals, special educators, or members of the core evaluation team. The workshop is complete with a media-oriented approach; the format includes small group, individualized and independent study, readings, discussions, and problem-solving sessions. The workshop requires full participation of local school personnel working with a qualified instructor identified by MEC.

This training program is designed to achieve the following objectives:

Objective 1. Each participant will be able to demonstrate an understanding of the rationale for returning the handicapped child to an appropriate classroom placement within the public school setting.

Objective 2. Each participant will be able to demonstrate an understanding of alternative administrative organizations and instructional arrangements for programming for handicapped students in the regular classroom.

Objective 3. Each participant will be able to demonstrate the skills necessary to administer a building special education program.

Objective 4. Each participant will be able to design a needs assessment for the school building and will develop a plan for inservice education for the school building staff.

The focus of this program is for principals and central office personnel who will implement the changes from teaching mildly handicapped children in self-contained special education classrooms to teaching them within the mainstream of education, using special education services in a variety of delivery patterns.

To achieve the objectives, a problem-centered training program has been developed which is supported by a wide variety of media (audio, visual, print). The instructional strategies will enable participants to gather and analyze data related to a variety of problems and share the data with group members.

* D. Hafner, op. cit.

APPENDIX C

SCHOOL PLANNING GAME

HOUSE PLAN FORM I

Working Paper
(Not for use, distribution or reproduction)

Richard J. Lavin

Donald W. Meals

SCHOOL PLANNING GAME
House Plan: Form I

Planner - Player Procedures

Objectives

General: To obtain experience and insight into some of the factors affecting the creation of specifications for a portion (house) of a new secondary school.

Specific:
1. To identify assumptions pertinent to choices made in the course of developing facility and equipment specifications.
2. To list items of information needed in devising a facilities plan.
3. To allocate available space and staff to achieve optimal support for the educational program.

Pre-Planning Orientation

Information: Review the documents provided to identify facts and constraints associated with the planning task. Read the procedures which follow and become familiar with the model. Receive and review report forms to be used in reporting plans. Formation of Planning Teams: The game manager or umpire will assign three (3) individuals to each team with one member designated as team leader. By mutual agreement the remaining members of the team will each assume responsibility for one of the following functions.

1. Recorder: Complete report form and provide a written record of assumptions and information requirements. The report form will be given to The Recorder by the umpire at the end of "game time". This form will be completed as soon as possible but not later than one hour after the end of the game.
2. Negotiator: Make exchanges with the umpire of playing pieces for new sets of pieces.

Preparation for Play: The umpire or his assistant will present the following to the Planning Team.

1. Game board and movable building elements
2. Student pieces
3. Teacher pieces
4. Administration and support personnel pieces
5. Equipment designators

Playing time will be specified at this time and the "clock" started. The umpire will designate the day and period for which the facility is to be arranged.

Playing: During the allotted playing time the Planning Team may arrange and rearrange the building elements as they wish, assigning students, teachers, and equipment to spaces.

The negotiater will apply to the umpire at any time after the first 20 minutes to exchange teacher, support and equipment pieces

according to the table of exchange values.

The Recorder will continuously record assumptions being made and needed data. After the playing period ends the Recorder will complete the report form and present this form to the umpire.

Post-Game Critique:

Team Leader: Presents model showing space arrangements and explains rationale along with those assumptions the Planning Team has made during the course of manipulating the model. Transactions are summarized by the Negotiator and copies of the playing record are distributed.

Umpire: Comments on utilization of personnel and space in reference to the assumed educational program.

Group: Planning Teams - one or more - will have been drawn from a larger group. Questions from the group will follow the umpire comments. When several teams report plans based on the same initial conditions the Planning Teams or their leaders will participate in a panel discussion of the several plans. Subsequently, questions will be addressed to the panel members from the total group.

SCHOOL PLANNING GAME
House Plan - Form I
Transaction Table

Personnel	Number	Equivalence in Exchange
Students - 600	360 College Prep. 150 Commercial 90 General	Planners designate
Teachers	36	
Counselors Administrators Librarians Health Specialists A/V Specialists	9	Two (2) para-professionals of any type for any professional
Para Professionals		
Clerical Library A/V Health		One (1) professional for any two para-professionals

Space: 36,000 ft.^{2} (20x18)squares
scale - 100 ft.^{2} = 1 square

Fixed

Associated Requirements

Equipment	Number	Value Units
TV monitors	4	10
8 mm. projectors	5	1
OH projectors	10	2
16 mm. sound projectors	2	
35 mm. film strip-record projectors	5	1

One para-professional or .5 professional A/V specialists allocated to support each 10 value units.

Exchanges may be made to use any combination yielding the assigned total of value units.

Additional equipment may be used if one para-professional is allocated from the staff for each 10 value units.

PLAN SUMMARY
HOUSE PLAN - FORM I
School Planning Game

Space Utilization	$ft.^2$	Students	$ft.^2$/student	% used during test period
Instructional space				
Total space				% instructional space
Group Size (test period)	Number of such groups	Students in each		Average group size
Large group				
Small group				
Staff Allocation	Number	students		Ratio
Professionals				
Para professionals				
Total staff				
Equipment	Item (list)	Number	Value units	

FORM APPROVED
OMB NO. 68-R1143.

DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE

IDENTIFICATION NUMBER *(If known)*

PROTECTION OF HUMAN SUBJECTS CERTIFICATION

☐ Contract ☒ New
☐ Grant ☐ Renewal
☒ Fellowship ☐ Continuation

STATEMENT OF POLICY: Safeguarding the rights and welfare of human subjects involved in activities supported by grants or contracts from the DHEW is the responsibility of the institution which receives or is accountable to the DHEW for the funds awarded for the support of the activity. In order to provide for the adequate discharge of this institutional responsibility, it is the policy of the Department that no grant or contract for an activity involving human subjects shall be made unless the application for such support has been reviewed and approved by an appropriate institutional committee. (Reference: "Institutional Guide to DHEW Policy on the Protection of Human Subjects.")

1. TITLE OF PROPOSAL
Establish Effective Training Linkages in Special Education at the Local Educational Agency Level

2. PROJECT DIRECTOR/PROGRAM DIRECTOR/FELLOW
Richard J. Lavin
POSITION TITLE
Executive Director

3. INSTITUTIONAL COMPONENT OR DEPARTMENT
Merrimack Education Center

4. CHECK ONE OF THE FOLLOWING STATEMENTS AS APPLICABLE:

☐ A. This application does not propose any activities that would involve human beings who might be considered subjects, human material, or personal data from primary or secondary sources.

☐ B. This is to CERTIFY that this application which does propose activities involving human subjects has been reviewed and approved by our institutional committee on the date of _____ in accordance with the DHEW policy and the institutional assurance on file with the DHEW. (The review date should be recent; certification is invalid if review date would precede award date by more than one year.)

☐ C. This is to CERTIFY that this application which proposes to involve human subjects is pending review on the date of _____ in accordance with the DHEW policy and the institutional assurance on file with the DHEW. If the committee does not review and approve the proposal by or on the date certified, the agency office requesting this certification will be notified immediately by telephone, telegraph, or mail. (Review date should precede requested or planned date of award by at least one month whenever possible.)

☐ D. This application proposes to involve human subjects. This institution does not now have an active assurance on file with the DHEW. I understand that information on the assurance procedure will be received should the application become eligible for an award.

5. SIGNATURE OF INSTITUTIONAL OFFICIAL AUTHORIZED TO SIGN PROPOSALS
Richard J. Lavin

DATE
May 3, 1974

6. TITLE
Executive Director

TELEPHONE NO. *(Code, No., Extension)*

7. NAME AND ADDRESS OF INSTITUTION *(Street, City, State, ZIP code)*
Merrimack Education Center
101 Mill Road, Chelmsford, Mass. 01824

NOTE TO AGENCY: This form should NOT be included with application forms that have provision for human subject certification. It may be used to request certification, or correction of certification.

HEW 596 (Formerly NIH 1611)
8-72

ENCLOSE THIS FORM WITH THE PROPOSAL OR RETURN IT TO THE AGENCY REQUESTING ITS COMPLETION

GSA DC 74-9133

ASSURANCE OF COMPLIANCE WITH THE DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE REGULATION UNDER TITLE VI OF THE CIVIL RIGHTS ACT OF 1964

Richard J. Lavin, Ed.D. (hereinafter called the "Applicant")
(Name of Applicant)

HEREBY AGREES THAT it will comply with title VI of the Civil Rights Act of 1964 (P.L. 88-352) and all requirements imposed by or pursuant to the Regulation of the Department of Health, Education, and Welfare (45 CFR Part 80) issued pursuant to that title, to the end that, in accordance with title VI of that Act and the Regulation, no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department; and HEREBY GIVES ASSURANCE THAT it will immediately take any measures necessary to effectuate this agreement.

If any real property or structure thereon is provided or improved with the aid of Federal financial assistance extended to the Applicant by the Department, this assurance shall obligate the Applicant, or in the case of any transfer of such property, any transferee, for the period during which the real property or structure is used for a purpose for which the Federal financial assistance is extended or for another purpose involving the provision of similar services or benefits. If any personal property is so provided, this assurance shall obligate the Applicant for the period during which it retains ownership or possession of the property. In all other cases, this assurance shall obligate the Applicant for the period during which the Federal financial assistance is extended to it by the Department.

THIS ASSURANCE is given in consideration of and for the purpose of obtaining any and all Federal grants, loans, contracts, property, discounts or other Federal financial assistance extended after the date hereof to the Applicant by the Department, including installment payments after such date on account of applications for Federal financial assistance which were approved before such date. The Applicant recognizes and agrees that such Federal financial assistance will be extended in reliance on the representations and agreements made in this assurance, and that the United States shall have the right to seek judicial enforcement of this assurance. This assurance is binding on the Applicant, its successors, transferees, and assignees, and the person or persons whose signatures appear below are authorized to sign this assurance on behalf of the Applicant.

Dated May 3, 1974

Richard J. Lavin
(Applicant)

By Executive Director
(President, Chairman of Board, or comparable authorized official)

101 Mill Road

Chelmsford, Massachusetts 01824
(Applicant's mailing address)

HEW-441
(12-64)